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ABSTRACT

"Lighting New Fires: American Catholic Schools for the 21st Century" is a National Catholic Educational Association (NCEA) program that has called on every Catholic school to undertake educational planning. This manual was written to take a school community through the details of the entire planning process. Following the foreword, the first section describes the rationale for strategic planning in a Catholic school. The next six sections detail the six phases of the planning process. Phase 1--initiating the planning process--involves the pastor, principal, and school board. Phases 2 through 4 are the work of the strategic long-range planning committee. These activities include considering contextual and internal elements, developing the strategic plan, and drafting and refining the plan. Phase 5, designing and carrying out implementation strategies, is the responsibility of the principal. The sixth phase, updating the plan on a regular basis, is carried out by the principal and the board. Appendices contain information on steps in the planning process, sample timetables, worksheets, background materials, suggested meeting agendas, and a postplanning questionnaire. (LMI)

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TAKING HOLD OF THE FUTURE

ABCs of Strategic Planning

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TAKING HOLD OF THE FUTURE: THE ABC's OF STRATEGIC PLANNING

Jean Wincek, CSJ, Ed.D.
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National Catholic Educational Association

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TABLE OF CONTENTS

FOREWORD vii

ABOUT THE AUTHORS ix

OVERVIEW STRATEGIC LONG-RANGE PLANNING 1
Why a Catholic School? 1
Why Do Strategic Long-range Planning? 3
What Is Strategic Long-range Planning? 4
Roles and Responsibilities 5
Planning and Development 5
Planning and Accreditation 6
Other Considerations 6
Final Notes 6

PHASE 1 INITIATING THE PLANNING PROCESS 7
First Board Meeting 7
Discussing Preliminary Issues 7
Articulating Benefits and Concerns 8
Making a Decision 8
Agenda Questions for the First Board Meeting 9
Second Board Meeting 9
Reviewing the Planning Process 9
Deciding on the Scope of the Planning 10
Determining the Need for a Consultant or Facilitator 10
Constructing a Timetable and Calendar of Meetings 11
Determining Where the Meetings Will Be Held 11
Considering Expenses 12
Designating the Planning Committee 12
Clarifying Roles and Responsibilities 13

Appointing a Chairperson or Cochairpersons .. 13
Determining What Background Material Is Needed 13
Planning Communications 15
Concluding Phase 1 15

PHASE 2 CONSIDERING CONTEXTUAL AND INTERNAL ELEMENTS 17
Meeting 1 or Evening Session 17
Convening the Meeting 18
Commissioning Ritual 18
Reviewing the Planning Process 18
Discussing Background Materials 19
Reporting to the Full Committee 19
Wrap-up 20
Meeting 2 or Morning Session 20
Investigating History 21
Looking at the Current Situation 21
Projecting the Mission 22
Reviewing Personal Beliefs 22
Wrap-up 23
Meeting 3 or Afternoon Session 23
Convening the Meeting 23
Brainstorming External Factors 24
Brainstorming Internal Factors 24
Assessing External Factors 25
Sorting Internal Factors 25
Determining Critical Issues 25
Suggesting Possible Strategies 26
Wrap-up 26
Signing Up for Subcommittees 27

PHASE 3 DEVELOPING THE STRATEGIC PLAN 29
Meeting 4 or Morning Session 29
Hearing Subcommittee Reports 30
Discussing Subcommittee Reports 30
Giving Feedback on Strategies 30
Explaining Subcommittee Assignments 30
Wrap-up 31

Meeting 5 or Afternoon Session 31
Hearing and Discussing Committee Reports ... 31
Affirming the Work of the Subcommittees 31
Deciding on Strategic Priorities 31
Reviewing the Format of the Plan 32
Wrap-up 32

PHASE 4 DRAFTING AND REFINING THE PLAN 33
Meeting 6 or Final Meeting 33
Presenting and Discussing the Strategic Long-range Plan 33
Testing the Plan with the Stakeholders 34
Planning the Presentation to the School Board 34
Discussing Next Steps 34

PHASE 5 DESIGNING AND CARRYING OUT IMPLEMENTATION STRATEGIES 35

PHASE 6 UPDATING THE PLAN ON AN ANNUAL BASIS 37

APPENDICES
Appendix A: Steps in the Planning Process 39
Appendix B: Sample Timetable and Calendar for Strategic Long-range Planning Meetings 42
Appendix C: Worksheet 1 - Benefits of Strategic Long-range Planning 44
Appendix D: Worksheet 2 - Concerns Regarding Strategic Long-range Planning 45
Appendix E: Worksheet 3 - Potential Members of the Strategic Long-range Planning Committee 46
Appendix F: Background Materials 47
Appendix G: Suggested Agendas for the Strategic Long-range Planning Committee Meetings .. 57
Appendix H: Commissioning Ritual 61
Appendix I: Meeting Prayer 62
Appendix J: Ending Ritual 63
Appendix K: Implementation Form 65
Appendix L: Postplanning Questionnaire 66

FOREWORD

NCEA's program Lighting New Fires: American Catholic Schools for the 21st Century calls on every Catholic school to undertake planning so it will have an effective program for its students. Planning challenges the school community to examine its roots, mission and current performance; set realistic goals; devise ways to achieve the goals; implement these activities; and hold itself accountable for completing what it said it would do. Planning is as important for a school as a road map is for a driver seeking an address in an unfamiliar area.

Some people consider planning an arduous and time-consuming exercise that has little impact on day-to-day life. Such people probably do not understand the importance of planning nor do they know how to formulate an effective school plan. The plan envisions what should happen on a day-to-day basis several years from now and sets in motion the processes to create this vision. Because education is concerned with the present and future lives of people, a comprehensive vision is essential.

Because planning is so fundamental to educational improvement, the NCEA Department of Elementary Schools requested Sister Jean Wincek, CSJ, and Sister Colleen O'Malley, CSJ, to write this book. They were instructed to develop a manual that would take a school community through the whole process from the original desire to do planning to the yearly revision of the plan. They were further instructed to detail every step in the planning process so a person relatively unfamiliar or not completely at ease with planning would know exactly what to do. Finally, they were instructed to do this in a most readable manner. This book demonstrates that they have achieved these objectives. Their training and experience have enabled them to do this in these few pages.

The NCEA Department of Elementary Schools thanks the two authors for providing its members with this manual, which is an essential book for the library of every principal, pastor, chairperson of the school board, and chairperson of the home and school association. The department also expresses gratitude to its own Tara McCallum, who proofread and edited the manuscript, and Sister Ann Sciannella, SND, who prepared the manuscript for production; and to NCEA's Communications Office

staff Beatriz Ruiz, who produced the page layouts, and Tia Gray, who designed the cover.

The department offers this book to its members with the assurance that they now have a most valuable aid to enable them to become an American Catholic School for the 21st Century.

Mary Ann Governal, OSF, Ed.D.
President

Robert J. Kealey, Ed.D.
Executive Director

NCEA Department of Elementary Schools
Feast of the Annunciation of Mary, 1995

ABOUT THE AUTHORS

Jean Wincek, CSJ, and Colleen O'Malley, CSJ, have focused many years of their professional work on the education of children in Catholic schools. First as teachers, then as principals, they have worked in several schools primarily in the Archdiocese of St. Paul-Minneapolis.

Currently, Jean and Colleen are certified presenters of the 4MAT System and consultants for educational theory and technology for Excel, Inc., in Chicago. They also do adjunct team-teaching in the graduate programs in education for the University of St. Thomas in St. Paul and for St. Mary's College of Minnesota in Minneapolis.

Jean Wincek is the author of *Negotiating the Maze of School Reform*, a 1995 publication of Teachers College Press.

OVERVIEW

Strategic Long-range Planning

A Catholic school is a precious legacy of a community, handed down from generation to generation. Its mission includes combining commitment to excellent academic education with an immersion in Christian tradition, values, and service in an environment that calls forth each student's highest potential. The Catholic school prepares the student to be both a lifelong learner and a responsible and responsive member of society.

Strategic long-range planning gives educators and boards a process for ensuring and shaping the future of a Catholic school by looking at long-term goals and the means to achieve them. In this Overview, we begin by reviewing the unique contribution a Catholic school makes in a community. Next, we link the importance of Catholic schools with the value of strategic long-range planning. Finally, we explore relationships between the planning process and other activities and processes often found in a Catholic school setting.

Why a Catholic School?

In a Catholic school, as in all excellent schools, a parent can expect to find a rich academic program. The school nurtures not only the intellectual development of each student but also the physical, emotional, social, and spiritual development. What, then, are the unique and distinguishing features a parent finds in a Catholic school?

A parent can expect a Catholic school to have a community climate permeated by the Gospel spirit of freedom and love. These are not new ideas. On October 28, 1965, the Second Vatican Council promulgated the *Declaration on Christian Education*. This document, as well as one published in 1988 by the Vatican Congregation for Christian Education, *Religious Dimension of Education in a Catholic School*, describes the Catholic school as a place that recognizes each student as a unique person, loved by God and involved in a lifelong process of personal development, learning, and growth in faith. Not only religion class, but also the very climate of the school, upholds the spirit of the Gospel. The practices and procedures of the school reflect a deep respect for each individual person.

In a Catholic school, as in a family, Gospel values are lived and proclaimed in community. Attitudes and behaviors on which community thrives include cooperation, peace, and service. Teachers can use everyday experiences to deepen the student's awareness of the precious dignity God gives to each human being. Teachers can encourage each child's efforts to see mistakes as opportunities for growth. The teachers in a Catholic school form a community of faith and extend this community to the students and their parents.

Hospitality needs to be a hallmark of a Catholic school. The first impression of a school is often a lasting impression, especially for parents who may be considering a Catholic school for their child but who have themselves been away from the institutional Church for some time. It is critical that this first attempt to reconnect with their religious roots be one in which they feel welcome.

A Catholic school welcomes differences among persons and supports persons with special needs. Parents have an active role in a Catholic school. Teachers and administrators are accessible. Students understand Christian service not only as going out to meet people's needs, but also as seeing and responding to the needs of their sisters and brothers in Christ who are nearby.

Students in a Catholic school have the unique opportunity to celebrate their communal bonds in liturgy and in other prayer opportunities. With their classmates and teachers, they turn to God in praise and petition, linking their lives and their faith.

A Catholic school recognizes the parent as the primary educator of the child. The school augments the parent's and the parish community's efforts to pass on to the child the message of Jesus.

In 1972 the United States Catholic bishops affirmed their conviction that Catholic schools "are the most effective means available to the

Church for the education of children and young people" (*To Teach as Jesus Did*, National Conference of Catholic Bishops, p. 33). In their 1990 *Statement in Support of Catholic Elementary and Secondary Schools*, the bishops reaffirmed their conviction that Catholic schools must exist, saying: "Our Church and our nation have been enriched because of the quality of education provided in Catholic schools over the last 300 years. . . . Now we are called to sustain and expand this vitally important ministry of the Church" (United States Catholic Conference, p. 9).

Why Do Strategic Long-range Planning?

The existence of Catholic schools can no longer be taken for granted. The picture of Catholic education in the United States is not that of an elementary school in every parish. While many parish schools still flourish, in some communities financial conditions have forced parish communities to make painful decisions which included closing their schools. In other places, careful planning has resulted in the merging of schools, making Catholic education an accessible option for students in the area. In still other locations, there is a growing demand for Catholic education and new Catholic schools have been and are being built.

Whatever the form Catholic education is taking in a particular area of the United States, it is critical that communities put in place planning processes that enable them to be involved in shaping the future of their schools, whether that future involves downsizing, merging, closing, expanding, or building. Strategic long-range planning is a process that involves the primary stakeholders of a school in projecting the future of the school and in planning how to arrive at that future.

Strategic long-range planning is a tool used by leadership to involve the community in designing the preferred future of the school. When members of a community are engaged in planning for the future of the school, they have a stake in its future. Promoting a community's sense of ownership in the school is one way to ensure the school's future.

The process of strategic long-range planning results in goals that articulate the preferred future of the school and strategies to achieve these goals. Convinced that the school has a viable future and effective leadership to guide the school toward its goals, decision makers are more likely to look favorably on funding requests.

In addition to being a process of shaping the future, the outcome of the planning process is a product—the strategic long-range plan. The plan itself is a comprehensive road map and valuable tool in guiding the day-to-day operations of the school. Although no plan can take the place

of creative thinking and common-sense decision making, it can guide the school toward a vision of the future shared by the school's constituents. Thus, the plan itself can be a unifying factor in a school.

What Is Strategic Long-range Planning?

Strategic long-range planning is a process that articulates for a community what its school might look like in the future and guides the school toward its preferred future. Both elements, developing a vision for the future and determining the steps to achieve the vision, are essential to strategic long-range planning.

As mentioned above, planning is a process that yields a product. The product is a set of goals that delineate and direct the implementation strategies. The strategic long-range plan also establishes priorities for implementation. School constituents know why particular decisions are made at a certain time and they know approximately when to expect emphasis on what might be their favored programs.

A strategic long-range plan connects a school with its environment in a way that prevents environmental changes from having a devastating effect on the school. Although a school may appear to be healthy from an internal perspective, there may be external factors emerging that will have an impact on the school. In the process of planning, committee members take external trends into consideration when articulating the goals for the school. Although a school cannot change environmental trends, the leadership can be prepared to address them.

Typically, a strategic long-range planning process addresses the next three to ten years, with most schools opting for a five-year projection. The plan outlines realistic goals in areas such as enrollment, staffing, curriculum, other programs, facilities, development (including marketing and public relations), governance, and finance. It is not necessary that goals be developed in every category listed above. Nor are these necessarily the categories a school will use in its plan. The particular areas a school needs to consider in its plan will emerge during the planning process.

The planning cycle presented in this book is an ongoing process with six phases. Phase 1 involves the pastor, the principal, and the board. During this phase the preliminary work is completed. Phases 2 through 4 are the work of the strategic long-range planning committee. In Phase 5 the planning function rests mainly with the principal of the school. During this phase the principal works in consultation with appropriate groups and seeks board approval when necessary. Phase 6 provides for

the updating of the plan on an annual basis. The principal and the board carry the responsibility for this phase of the planning process. (See Appendix A: Steps in the Planning Process for an outline of each phase.)

Roles and Responsibilities

The school board is the body that is responsible for seeing that strategic long-range planning becomes a regular part of the school's cycle of events. Working with the pastor and the principal, the board determines when the planning process should begin, adopts the planning process it wishes to use, and invites members to serve on the planning committee. The strategic long-range planning committee performs an invaluable service for the school and for the board. The committee's work usually extends through one school year.

It is advisable that the pastor and the principal serve as members of the planning committee. Each has a unique role in the community and will bring an important perspective to the planning process. In circumstances where it is not possible for the pastor to come to the planning meetings, regular communication with him must be built into the planning process.

Planning and Development

The strategic long-range plan will have a positive influence on every aspect of the school's development program. The plan provides a basis for the school's case statement. It defines the future expectations of the development program by giving a detailed blueprint for major gifts.

As part of the development effort, the school's leaders will ask major donors to fund specific aspects of the plan, adjusting the requests to the donors' interests and capabilities. The director of development or the principal will write grant proposals to foundations and corporations for projects and capital improvements detailed in the plan.

The National Catholic Educational Association Development Training Program lists four cardinal principles of development. The development effort must demonstrate that the school is an example of quality Catholic education (an outstanding product) with sound business management (excellent administration) and an effective public relations program (publicity and consumer recruiting). With these three areas in place, the school will attract people (investors, volunteers, students) and dollars. The planning process can potentially examine each of these areas. Strategic long-range planning is essential for an effective development program.

Planning and Accreditation

Planning for school accreditation involves a complex process, primarily looking at the school's current status. The major participants in preparing for a validation visit are usually the teachers and the principal. Many of the materials assembled in the accreditation process could be used as background materials in a strategic long-range planning process. Positioning the planning process to follow the validation visit would be timely.

Other Considerations

Planning committee members will approach the task of planning from the perspective of their own preferred ways of arriving at conclusions. Some members may become impatient with the time it takes to discuss background issues. Some will want to move right into suggesting strategies before the goals are clear. For some members, the dollar will be the bottom line. For others, opportunities for children will hold highest priority. The planning committee chairperson will need to be sensitive to the variety of ways people approach the planning task and will need to assure people that their issues will be taken into account.

Final Notes

Throughout this book we have used the terms *principal* and *school board* for the sake of consistency. We acknowledge that these terms give a limited picture of the many types of bodies that assist in the governance of Catholic schools. However, whether school governance is shared with an education committee responsible for all education in a parish or it is done by a committee of the parish pastoral council, the process we suggest can be implemented with few adjustments.

A second note on the use of terms: We have used the terms *plan, strategic long-range plan,* and *planning process* throughout the book. We intend that they convey synonymous meanings. We have used the term *committee* to refer to the strategic long-range planning committee and the term *subcommittee* to mean a portion of the full planning committee.

We know that the users of this book will alter some of the suggested processes to fit their local needs. When you have completed your planning process, we would be grateful to hear your reaction to our suggestions and to receive a copy of any revisions you made in a process. At the end of the book is a postplanning questionnaire (Appendix I.) to use for this purpose.

PHASE 1

Initiating the Planning Process

The process of developing a strategic long-range plan for a school begins prior to assembling the members of a long-range planning committee. The principal and the board initiate the planning process and do preliminary work at regular or specially called board meetings. Taking time to clarify understandings and to attend to preliminary details will ensure a purposeful, committed, and smooth start to the strategic long-range planning process.

First Board Meeting

Most principals and boards prefer to spend one to two hours at two successive board meetings discussing the preliminary issues involved in long-range planning. If the principal and board wish to have the meetings of the long-range planning committee commence at the beginning of a new school year, the last two meetings of the school board in the spring would be an appropriate time to hold preliminary board discussions regarding the planning process and timeline. The Sample Timetable and Calendar for Strategic Long-range Planning Meetings in Appendix B gives an example of when strategic long-range planning meetings might be scheduled if preliminary discussions occur in spring.

Discussing Preliminary Issues. The agenda of this school board meeting includes time to discuss why the principal and board members want to

do long-range planning for the school. Planning is a time-consuming venture. Unless the principal and the school board can see how planning will enhance the life and ensure the future of the school, the process soon could become a burdensome and meaningless exercise.

A second issue for discussion by the school board is what each person understands by the term *strategic long-range planning*. The principal may advise school board members to read the Overview of this publication in preparation for the discussion. In addition, the school board and principal need to consider whether the timing is right to initiate a major planning process. For example, if the school is preparing for accreditation or launching a major development effort, beginning the strategic long-range planning process should be postponed.

Articulating Benefits and Concerns. Before making a commitment to begin the planning process, the principal and school board members should use Worksheet 1: Benefits of Strategic Long-range Planning (Appendix C) to list the benefits they see accruing from doing strategic long-range planning at this time. The list may be used as a basis for communicating the importance of planning to the strategic long-range planning committee as well as to parents, parishioners and other school stakeholders. On Worksheet 2: Concerns Regarding Strategic Long-range Planning (Appendix D), the principal and school board members list any concerns they have regarding the planning process. They also list ways to address or overcome their concerns and decide which means they will pursue. A written record of concerns and ways to address them will provide a list of action items for the principal and school board as well as background material and suggestions for action for the strategic long-range planning committee.

Making a Decision. Now the school board and principal are ready to make a decision about beginning the strategic long-range planning process. The decision may take the form of a formal motion to be entered in the board minutes, or it may be an informal consensus among members that they wholeheartedly support a planning process.

Typically a principal and school board would need to reserve at least one to two hours at a board meeting to arrive at an understanding, agreement, and commitment.

Agenda Questions for the First Board Meeting. At the first meeting, school board members and the principal address the agenda questions listed below.

- What do you understand by the phrase *strategic long-range planning?*
- Why do you think the school should engage in a strategic long-range planning process?
- How will doing this planning enhance the life and ensure the future of the school?
- Is the timing right to begin the process?
- What will be the benefits of doing long-range planning? (See Appendix C, Worksheet 1)
- What concerns do you have about doing long-range planning? How can we address these concerns? (See Appendix D, Worksheet 2)
- How will we proceed?

  Option 1:

  Make a commitment to do strategic long-range planning for the school and proceed with organizing the planning process.

  Option 2:

  Address the concerns, then decide whether to make a commitment and proceed with organizing the process.

  Option 3:

  Wait until a more appropriate time to make a commitment to doing strategic long-range planning.

  Option 4:

  Other.

Second Board Meeting

If the decision of the board is to make a commitment to do strategic long-range planning, the next step is to consider several practical details regarding the planning process. These considerations form the agenda for discussion at the second board meeting. The board can expect the discussion to take one and a half to two hours.

Reviewing the Planning Process. The first issue involves the planning process itself. The principal leads the school board in a review and

discussion of the outline of the planning process (see Appendix A: Steps in the Planning Process). The purpose of this review and discussion is to reinforce board members' understanding of the planning process, to determine if the suggested planning process suits the culture of the school community, and to ascertain if it seems realistic in terms of time commitment. The planning process outlined in Appendix A gives the strategic long-range planning committee the tools to complete a comprehensive plan for the school. The entire planning process typically requires approximately 30 hours of meeting time.

Deciding on the Scope of the Planning. The principal and school board need to decide on the scope of the long-range planning. Schools tend to do planning for a five-year period. This time span is short enough to use projections to determine probable trends with some accuracy, yet long enough to accomplish significant goals. A board may wish to consider a different time span to correspond with other time-consuming events in the school. For example, if accreditation renewal occurs every seven years, the principal may recommend that the strategic long-range planning coincide with the termination of the accreditation process.

Determining the Need for a Consultant or Facilitator. After reviewing the planning process, the board and principal should address the question of whether a consultant is needed or desirable to facilitate any part or all of the process. A consultant can facilitate the strategic long-range planning committee's meetings, thus freeing the planning committee chairperson to be a full participant in the process. When hearing opposing points of view on an issue, an outside facilitator can work with the group more objectively in resolving the issue and in coming to consensus. The expenditure of significant amounts of time by leaders in the community to produce a strategic long-range plan for the school requires an efficient and an effective process. A facilitator can be charged with modifying processes to meet group needs.

The question of whether to engage a consultant for the planning process raises financial questions. If there is someone in the community who has facilitation and long-range planning skills, perhaps that person would be willing to donate time and talent to the school for this project. If the school budget cannot cover the cost of a consultant or facilitator, the principal could write a grant proposal for the funds. In any case, the principal should not assume the task of facilitating the meetings. If the board does not engage the services of an outside person, it is the role of

the chairperson of the strategic long-range planning committee to conduct the meetings.

Constructing a Timetable and Calendar of Meetings. An essential task for the principal and board is constructing a timetable and a planning calendar of meetings. Sharing this information with persons invited to participate in the planning process will let them know the expectations of their commitment. Although the timetable and planning calendar of meetings include all six phases of the planning process, the work of the strategic long-range planning committee begins with Phase 2 and concludes with Phase 4. Appendix B contains a sample of a timetable and calendar of meetings.

Ideally the strategic long-range planning committee's first meeting is an evening and full day in a retreat setting. If this is not possible, a series of three three-hour meetings within a short time period could replace the ideal evening-and-full-day beginning. Following the initial meeting or series of meetings, subcommittees will need to meet to complete the work begun at the meeting(s) of the total committee.

A second full-day meeting is the ideal next step. If this is not possible, two three-hour sessions could replace the full day. Next, another subcommittee, a writing group, takes the planning committee's work and completes a draft of the strategic long-range plan. The writing group circulates the draft before the final meeting of the planning committee. The planning committee's final meeting is a two-to-three-hour session in which members review and revise the draft of the plan and recommend that it be presented to the school board for approval. The writing group may need to meet to incorporate the planning committee's suggestions into the final document before presenting it to the school board.

Determining Where the Meetings Will Be Held. Budget restraints and availability will influence the principal and board's decision on the location of the meetings. Critical to this discussion is the need for comfortable, adult-size chairs and tables. A school lunchroom with benches is not adequate for this type of meeting. A retreat setting away from the school would provide an ideal setting for the day-long sessions. Choosing a setting away from the school also emphasizes the importance of this once-every-five-years process. At a minimum, the room should be large enough for all participants to see one another around the table(s), to hear one another easily, and to move around the room freely.

Considering Expenses. The principal and school board members need to construct and agree upon a planning budget. A budgetary item already discussed is the fee for a consultant or facilitator. Additional costs may include use of space for meetings, meals and snacks for committee members, materials for committee members, postage for mailings to committee members, and supplies and postage for mailings to the school community.

Designating the Planning Committee. The school board and the principal's next tasks are to determine the size of the planning committee, to decide what constituencies should be represented, and to draw up a list of potential participants (see Appendix E, Worksheet 3: Potential Members of the Strategic Long-range Planning Committee).

Several factors influence the composition of the committee. It is desirable to have people with a diversity of backgrounds and experiences on the planning committee. In addition, planning committee members must have a commitment to the school and must be willing to devote the time necessary to participate in the planning process. Personal qualities to consider in selecting committee members include the abilities to listen well to others and to express one's own thoughts, willingness to participate in group processes, skill with asking questions, open-mindedness, and the ability to lend support to group decisions. Planning committee members must have credibility in the school community.

The size of the school and the community affect the decision regarding committee size. The size of a planning committee for a large urban school may be different from the size of the committee planning for the future of a small rural school. Typically, committee size can range from 10 to 30. The primary determination regarding size of the committee rests on whether the committee is representative of the school's stakeholders.

Groups and individuals who warrant representation on the planning committee include the school board, the school administration, the pastor, the parents, the alumni/ae, the parishioners, the faculty, and the students. If students are too young to participate, the planning committee can elicit their input at appropriate times in the process through activities such as focus-group discussions on issues that will affect them. A local businessperson who has an interest or a stake in the future of the school may be an appropriate member of the committee. A civic leader or a person from another educational institution may lend a valuable perspective to the planning.

The school board chairperson and the principal, in consultation with the pastor, usually appoint or invite persons to be members of the strategic long-range planning committee. At times, all the members of the school board have been planning committee members, and the membership has been filled in with persons representing other groups. In some schools, teachers elect a representative to serve on the planning committee. In any case, each person who will be on the planning committee receives a personal invitation to participate in the planning.

Clarifying Roles and Responsibilities. The principal, the pastor, and the chairperson of the school board have distinct functions within the school organization. However, as a planning committee member, each becomes one voice in a group of equals. This does not mean they abdicate their leadership roles and the scope of information they have because of their responsibilities in the school community. Rather, it means they share this information fully in order to assist the planning committee in coming to the best recommendations possible for the future of the school. Other members of the committee also need to share the information they have as fully as possible so that the planning process represents the voices of the entire community.

Appointing a Chairperson or Cochairpersons. Included in the preliminary planning is the selection of a chairperson or cochairpersons of the planning committee. Neither the principal, the pastor, nor the school board chairperson should assume this position. The role of the chairperson is to work with the principal in designing the agenda for each meeting and to facilitate the planning committee meetings. If there will be a facilitator working with the planning committee, the principal, the planning committee chairperson, and the facilitator may wish to work together in planning the agenda.

Determining What Background Material Is Needed. Since the strategic long-range planning committee members will need information about many aspects of the school, the principal and school board determine what should be in the initial packet of materials the planning committee receives. It is most helpful if the materials are concise and presented in graph or spreadsheet form. Also, the data should show trends in the school over a period of three to five years. For an example of information on enrollment data, see Appendix F: Background Materials. When statistical information is presented in a way in which committee members

can focus on trends, they can begin to examine why the trends are occurring and to envision what might happen if the trends continue into the future without intervention.

The following are examples of material that might be included in the planning committee's packets (see sample forms in Appendix F):

- **Statements**—mission statement of the parish, philosophy of the school
- **Financial data**—budgets, annual balance sheets, parish contributions to the school (subsidies), results of fund-raising and development efforts, tuition scales, tuition assistance, salary scales
- **Enrollment statistics**—enrollment by grade, enrollment by parishioner/nonparishioner, number of baptisms in the parish, schools attended by graduates
- **Personnel information**—faculty/student ratio, number of faculty members, composite of educational level of faculty, teaching assignments of faculty members, length of time on the faculty
- **Curriculum information**—the curriculum review process, significant changes that have been incorporated into the curriculum
- **Facilities information**—improvements that have been made in the past three to five years, improvements needing to be done
- **Comparative reports**—comparisons of data from the arch/diocese and school district on any statistical information listed above
- **Economic and demographic data**—statistics from the parish and from the area the school serves or could potentially serve

The strategic long-range planning committee members may request additional information as they participate in the planning process. They may, for example, wish to survey the community on a particular issue or they may decide to hold focus-group discussions to test an idea. The packet of materials the board and principal are assembling at this point provides initial information and orientation for the committee.

The principal may wish to include information on trends in education, particularly in Catholic education, in the resource packet. For example, NCEA's *Catholic Schools for the 21st Century: Executive Summary* provides a succinct summary of critical issues and sample strategies Catholic schools would do well to consider as they look into the future. Another

resource for the committee would be an issue of NCEA's journal *MOMENTUM*, which may be ordered in bulk. A copy of this journal would give the committee members an overview of issues important to Catholic educators.

Planning Communications. Finally, the board and principal should make plans for communication about the planning process. Two questions to guide this discussion are, To whom should we communicate? and At what points in the planning process should we send communications?

Groups that the principal and school board should consider in making plans for communication include current students and staff, parents of current students, donors, parishioners, leaders of school and parish organizations, parish pastoral council members, parish staff members, potential students and their parents, and friends of the school.

One critical time for communication is before the first meeting of the strategic long-range planning committee. Parents of students in the school and parishioners are two publics that should receive communications at this point. Depending on the school's regular channels of communication, it may be appropriate for teachers to receive this communication also. Many schools include information on the planning process in communication vehicles currently in place, such as newsletters to parents or parish bulletins.

A listing of planning committee members could be included in the first communication, along with a statement about the benefits of the planning process to the school. The tone of the communication should be upbeat and anticipatory of a strong future for the school. It should assure stakeholders that they will be hearing more about the planning as it progresses. The initial communication could, in a general way, invite people to contact committee members with any goals or concerns they hope will be addressed in the planning process.

- The principal and school board may wish to suggest to the planning committee that it consider using methods such as town hall meetings, questionnaires, or phone interviews both as ways of communicating and of gathering data.

Concluding Phase 1. When the school board and principal have completed their discussions of topics included in Phase 1 of the planning process, sufficient time is needed to complete work such as contacting potential committee members and assembling the packet of materials for the committee. It is not unreasonable to plan for a 10-to-12-week period

between the conclusion of Phase 1 and the first meeting of the strategic long-range planning committee, which begins Phase 2.

PHASE 2

Considering Contextual and Internal Elements

The work of the strategic long-range planning committee begins in Phase 2 of the process. Each committee member comes to the meeting having read the background materials and ready to begin an energizing and challenging task.

The following descriptions of the meetings are divided into three-hour blocks in order to accommodate both groups that plan an evening and full-day sequence for their first meetings and groups that find three three-hour meetings more suitable to their needs. Planners may adapt the Suggested Agendas for the Strategic Long-range Planning Committee Meetings in Appendix G to either format. The headings in the descriptions of the planning committee meetings that follow correspond with the topics on the suggested agendas in Appendix G.

Materials needed for each session of the planning process include a name tag for each participant, 18-inch by 24-inch chart paper, wide-tip washable markers, an overhead projector, a suitable wall or screen for projection, transparencies and pens, masking tape, Post-it Notes, sheets of colored 3/4-inch to 1-inch diameter self-adhesive dots, and a lectern or podium for the chairperson or facilitator.

Meeting 1 or Evening Session

Hospitality should be the hallmark of the first meeting of the strategic long-range planning committee. The pastor, school board chair-

person, principal, and chairperson(s) of the strategic long-range planning committee should plan to be at the meeting early enough to greet and welcome each planning committee member. If possible, plan to serve a light supper prior to meeting. If serving supper is not possible, inviting members to help themselves to dessert or snacks while mingling with other committee members serves as a warm and informal beginning to the planning process. If the planning meeting is scheduled from 6:00 p.m. to 9:00 p.m., for instance, the light supper or reception could be planned to occur from 6:00 to 6:30.

Critical for efficiency and credibility of the process is beginning and ending the meetings at the scheduled times. If the meeting begins after the designated time, the chairperson should acknowledge the delay. If, for an important reason, a meeting must be extended beyond the scheduled time, it is appropriate to stop at the scheduled time and ask members if they are able to extend the meeting by a specific number of minutes.

Convening the Meeting. The chairperson or cochairpersons of the strategic long-range planning committee convene the planning committee meeting by introducing themselves, welcoming the committee members, and reviewing the agenda for the session (see Appendix G). Next, the pastor and principal each give a short welcome, pointing out the importance of the work the committee is about to undertake. They may wish to point out that the essential work of the committee will be to define goals that will direct a major portion of the life and energies of the school for the next five years. The committee's task will also include recommending priorities for the implementation of the strategic goals.

After the welcome, the chairperson asks committee members to introduce themselves, telling the group four things about themselves: their major work commitments, how they are associated with the school, why they said yes to being on the committee, and what skills or expertise they bring to the planning process.

Commissioning Ritual. Following the introductions is the ritual of commissioning. Appendix H presents a suggested ritual. The principal has prepared sufficient copies for everyone on the committee. The chairperson serves as leader. This ritual constitutes the prayer for this opening session.

Reviewing the Planning Process. The next portion of the meeting is devoted to giving committee members an overview of the planning pro-

cess. Each participant should receive a copy of the Steps in the Planning Process from Appendix A as revised by the principal and board at their second initial planning meeting.

In order to emphasize where the responsibility for each phase of the planning process rests, it is appropriate for the school board chairperson to begin by reviewing the principal and board's work on Phase 1 with the committee. The chairperson(s) of the strategic long-range planning committee explains the work of Phases 2, 3, and 4, leaving time for questions about and discussion of the process. Since the responsibility of setting forth the implementation program belongs primarily to the school administration, the principal reviews the work of Phases 5 and 6. After questions and discussion, the chairperson may ask that the committee formally adopt or affirm the planning process.

Discussing Background Materials. The final agenda item for the first meeting is discussion of the background materials each committee member received in the initial packet. One way to facilitate the process of review is to divide committee members into as many groups as there are categories of information in their packets. Categories may include curriculum, finance, development, enrollment, personnel, facilities, and educational issues. In order to have an equal number of persons in each group, the chairperson may assign each committee member a number corresponding to a category. Groups may be prearranged by including a number on each person's name tag.

The use of Post-it Notes serves as an effective and efficient technique for groups to summarize or review information. Each group reviews and discusses the information in its assigned category from the initial packet. Then, if there are questions they have concerning the information, preliminary trends they see in the information, or additional information they would like to have in their area of review, they write these things, each on a separate Post-it Note.

Reporting to the Full Committee. Following the group discussions, each group gives a brief report to the whole committee, using the Post-it Notes as a guide. The group attaches its Post-it Notes to sheets of chart paper labeled "Questions," "Trends," and "Additional Information." After all the groups report, if time allows, questions may be addressed, trends may be discussed, and the need for additional information may be verified. As questions are answered, the Post-it Note is taken off the chart paper. Following the meeting, the questions, trends, and additional in-

formation requests are typed as part of the record of the meeting. Each committee member receives a copy of the typed material and the committee returns to these topics at the next session.

Wrap-up. In concluding the first meeting, the chairperson asks members to take a moment to reflect on what aspect of this meeting gave them the most energy. The chairperson begins with a reflection, then invites others to share theirs. Listening carefully to each person's statement may give the chairperson feedback on how to capitalize on the committee's energies at future meetings.

Meeting 2 or Morning Session

If the second meeting is a morning session, plan to have coffee and rolls or donuts available as committee members assemble. For an evening meeting, plan to serve beverages, such as coffee and cold drinks, and cookies or candy bars either at the beginning of the meeting or at the break. In addition, have the same materials available as are listed for Meeting 1. Begin this meeting with a prayer, such as the one found in Appendix I: Meeting Prayer. Each person receives an agenda for the meeting (see Appendix G).

Prior to the meeting, the committee chairperson works with the principal to find written documentation of the history of the parish and the school. At times, the history of a parish and school, compiled at the time of an anniversary, contains stories that reflect not only early struggles and joys but current challenges and opportunities. These little-known stories can serve as touchstones in understanding current issues and dilemmas.

An example of finding such a story occurred when we were facilitating discussions among four parishes regarding the potential merger of their schools. Three parishes were in a first-ring suburb and the fourth parish was in an adjacent suburb, separated from the others by a large freeway system. A recurring question during the discussions was why the fourth parish was included in the planning process, since it was across the freeway in another suburb. The issue of attendance areas for the churches and schools came to the fore also.

In investigating the history of the parishes, we found that the tension between people in these suburbs was not a new issue. In 1875 German pioneers met and decided to build a Catholic church. The founders decided that since the church was to serve the settlers of two townships, its location would need to be in the center of the territory, on

the boundary between Bloomington and Richfield, at an equal distance from the eastern and western lines. The church document goes on to say that "in order to satisfy the people of both townships, the place where the church was to be located was called 'Bloomfield,' a name made up of the first syllable of Bloomington and the last of Richfield." Hearing this story, committee members realized that the founders' sense of trying to unite the communities had been lost over the years. They saw that in their discussions they were facing the same challenge their church ancestors had encountered.

If no written documentation is available, perhaps a long-time parishioner can recall stories of earlier days that can help explain the current situation. The pastor or planning committee chairperson could make arrangements to interview the parishioner to gather stories the person knows. Delving into a parish and school's history provides a rich resource for a planning group.

Investigating History. If possible, begin the meeting by having someone with storytelling ability tell a story or two, gathered from the sources suggested above, about the early days of the parish and school. Then, have a long piece of paper (e.g., roll of shelf paper) spread on a table or taped to the wall. Have the founding date of the school and parish labeled and have the paper marked off in decades. Invite committee members to take a marking pen and write significant events, circumstances, or happenings they remember about the school and parish on the paper. They may also write the names of persons who influenced the community on the paper. This collective timeline not only evokes memories but stirs gratitude for the work of those who have gone before. The work of the strategic long-range planning committee is built on a legacy left by others.

When committee members have written their contributions on the timeline, instruct them to read the recollections of other members. Then, as they remain standing, they may ask for clarification of unfamiliar events. When committee members return to their places, the chairperson may ask for a brief discussion focused on the question, What can we learn from our history?

Looking at the Current Situation. The second item on the agenda is a briefing on the current situation of the school from several perspectives. The principal, the pastor, the school board chairperson, a faculty member, a parent, and a student—these or any other persons who might have insight into the current situation of the school—may be asked to address

the committee for a maximum of five minutes. The presenters may take their cues from the Questions and Information Needed portion of the previous session or they may address two questions, What are the three things I most value about the school? and What are the three most important issues the school currently faces?

This portion of the meeting is an information-gathering opportunity for the members of the strategic long-range planning committee. Committee members are listening to each speaker for issues and trends. After the presentations, the committee chairperson can invite members to express what they heard as issues and trends.

Projecting the Mission. After a break, the committee members are ready to address the questions: What role do we want this school to play in the community five years from now? How will the school serve the community? Whom will the school serve? Why should the school not only exist but flourish five years from now? These questions address the school's raison d'être, its mission in the community.

The chairperson divides committee members into groups of four or five and instructs them to use the above questions (also listed on their agenda) as discussion starters. Groups may be predetermined by including a number on each person's name tag or by assigning numbers to members as they sit around the table.

Each group receives a piece of chart paper and markers. After the group discusses the questions for about 15 minutes, participants should write a summary of their responses to each question on the chart paper. The leader then reassembles the committee and asks a representative from each group to present the group's responses to the questions. When each group has presented its ideas, the leader calls for discussion of similarities and differences in the groups' ideas and notes areas of agreement on a piece of chart paper or on an overhead transparency.

Although this work is being done early in the planning process, it is important to gain a sense of the planning group's picture of the school's mission. The written documentation of each group's discussion, along with the record of the entire committee's discussion, is preserved to be given to the subcommittee that will meet after the third session.

Reviewing Personal Beliefs. The final portion of this meeting is devoted to looking at the current philosophy or vision statement of the school. This statement is a set of beliefs and operating principles that govern the daily life of the school. This statement should say in words what is in the

heart of everyone associated with the school. It expresses core beliefs that are almost palpable when one enters the school building.

One way to examine the philosophy or vision statement is to give the group 10 minutes of quiet time to allow each person to read the statement and to mark the three to five ideas or beliefs, depending on the length of the statement, that are most important to the reader.

If possible, before the meeting, have someone put each idea from the philosophy or vision statement on a separate sheet of chart paper and post these papers around the room for this portion of the meeting. After each person has the opportunity to reflect on the philosophy and to choose three to five important beliefs, give participants three to five colored dots (3/4 inch to 1 inch in diameter, so they can be seen easily) to place on the chart paper belief statements that match their choices of important beliefs. This technique gives a visual sense of what beliefs are important to the members of the planning committee as a whole. As with the previous exercise, the chairperson asks the group to respond to what they see. After the third meeting the chart paper with colored dots is given to the subcommittee, who will not alter the philosophy at this point but will write a short narrative about what seems most important to committee members about the philosophy. The full committee will revisit the mission and the philosophy (vision) at its final meeting to see how these documents match with the strategic goals and the priorities for implementation the group will begin to establish at the next meeting.

Wrap-up. Conclude the meeting by asking each person to share with the group one important insight gained at this meeting.

Meeting 3 or Afternoon Session

Meeting 3, the afternoon session, calls for the same physical preparation as the previous two sessions. The work of the third session requires a leader skilled in group facilitation; in particular, one who knows how to lead a group in brainstorming and in synthesizing ideas.

Convening the Meeting. After convening the session, leading the prayer, and reviewing the agenda, the leader reviews the rules for brainstorming with the committee. In a brainstorming session—

- Share ideas freely, no matter how insignificant or impossible they may seem
- Keep statements brief so the recorder can write the thought clearly

- If an idea extends or piggybacks on someone else's idea, say that, then give the idea
- Do not discuss, criticize, or evaluate the ideas offered
- Allow for pauses so that people can scan ideas and think

Often the best and most creative ideas come near the end of the brainstorming session.

Brainstorming External Factors. The first agenda item that committee members will brainstorm is external factors, sometimes called environmental trends, which may impact the school in the next five years. *Impact* means having either a positive or negative influence on the school. External factors are issues or trends over which committee members have no control but which may need to be considered in the strategic planning process. Some planners pose the question, What external opportunities and threats will the school face in the next three to five years?

Factors may include items such as local population trends and statistics, economic and job-related issues, impacts of the political climate, influences of technology, social and religious values of the population, and trends in education. Participants should include international, national, and local concerns in their list of external factors or environmental trends.

During the brainstorming session the facilitator records each idea on large newsprint, keeping each page visible as more pages are needed. Also, the facilitator enforces the rules of brainstorming and keeps the group moving.

Brainstorming Internal Factors. When participants find they have listed all the ideas regarding external factors that come to their minds, they move to the next area, internal factors. In this round of brainstorming, committee members express any internal issues they believe ought to be considered in the planning process. Internal issues are items that those associated with the school can control, given sufficient staffing and resources. Questions that can focus the idea-generating called for here are, What are the school's strengths and weaknesses? and What needs to be developed?

The brainstorming rule of not passing judgment on an issue is particularly important as committee members express their ideas during this part of the agenda. The principal and teachers may hear ideas they know they could not implement with current staffing and resources. Remembering that this is an idea-generating exercise, not a consensus-

building or decision-making activity, is critical. Evaluation of ideas along with consensus-building and decision making come later. Some ideas presented in this session will form the basis for goals and strategies for the long-range plan; others will fade from importance during a later process of evaluation and discussion; and still others may not be grist for the strategic planning mill, but may be ideas that the principal and faculty would want to consider for more immediate implementation.

Assessing External Factors. The next step in the process is to return to the list of external factors. Committee members need to assess the likelihood and force of each factor's impact on the school and begin to think about how they will prepare to address the issue. These external factors form the backdrop for the goals they will write for the school.

One way to approach this assessment is to go through the brainstorming list of external factors, discuss each issue, and give it a rating from 0 through 5, 0 representing no impact on the school and 5 representing significant impact in the next five years. Participants may find that they need more information on certain issues before appraising their influence on the school. This need should be indicated next to those items along with the name of someone who volunteers to get the additional information. Valuable information may be available through the local school district or the city planning office.

Sorting Internal Factors. The next task of the committee is to sort the internal factors into categories such as personnel (administration and staff), students (including enrollment), governance, finance, families, programs, curriculum, development (including marketing and public relations), and physical plant. As committee members suggest categories for each brainstormed item, the leader notes the category after the issue. If an idea needs clarification, questions may be asked at this time. Meanwhile, a second person sets up new sheets of chart paper, giving each sheet a heading suggested by committee members and listing brainstormed issues under the category. These groupings usually form the categories around which strategic goals are written.

Determining Critical Issues. When the categorizing is complete, it is time to assess which issues seem most important to committee members. If time allows, the chairperson could ask participants to comment on an area they see on the newsprint that they think is important to include in the long-range goals. More important than discussion or debate is the

opportunity for committee members to articulate what is important and therefore needs to be considered by the subcommittees when they formulate the long-range goals.

Following this around-the-table activity, each committee member receives one five-color sheet of 3/4-inch adhesive dots. Assign a meaning to each color, e.g., red = hot issue; orange = important topic; yellow = probably should consider it; green = consider it if possible; blue = not important now, drop it. Committee members may apply as many dots to an issue as they wish in whatever way they wish. For example, a member may think an issue is of such importance that three red dots from that individual's sheet are allocated to one item.

When all members have completed this task, the group will have a visual image of the categories of issues that are most important and therefore will form the basis of the goals for the strategic long-range plan. Items that received a significant number of red, orange, and yellow dots become the critical issues around which strategy is formed. Some items may not have any dots next to them. These issues, along with the other items, will go to the subcommittees to be formed at the end of this meeting and will be considered by those groups.

Suggesting Possible Strategies. The final task in this session is to review the critical issues and ask committee members to suggest ways the issues might be addressed over the next five years. For example, if an item under finance, which received a large number of red and orange dots, is to improve teachers' salaries, ways the issue may be addressed include raising tuition, increasing class size, beginning a development program, reexamining the concept of scale, and looking at alternative methods of determining salaries. Note that each suggestion begins with a verb, which gives direction to what could be done to achieve the goal.

The full committee should consider at least one issue in each category, beginning with the issue that received the most affirmation. This method of considering alternatives before winnowing down the suggestions is a model for the subcommittees to follow as they generate strategic long-range goals and recommendations for implementation.

Wrap-up. In leading the wrap-up portion of this meeting, the chairperson asks each committee member to reflect on the questions, What happened during this meeting that moved us toward our goals? What portion of the meeting was most useful to you? The chairperson invites members who are willing to state their perspectives to share with the group.

Signing Up for Subcommittees. Before leaving the meeting, each member signs up to be on a subcommittee whose task will be to develop a comprehensive goal statement that articulates where the school will aim to be in the area under consideration, e.g., physical plant, in five years. In addition, the subcommittee writes a rationale and gives suggested strategies to achieve the goals. These items come from the categorized brainstorming lists and from the further research of the committee.

One subcommittee should be designated to review the work done by the planning committee at the second meeting on the mission and philosophy of the school. The tasks of this subcommittee are to review the current mission and philosophy in the light of the committee's discussions and to write a short narrative about what seems most important to committee members about the mission and philosophy.

One planning committee with whom we worked realized that basic maintenance of the building had been a priority over the years and that the major systems and structures in the building were sound. However, there were certain items that deserved attention and improvement from safety and educational perspectives. The school's physical plant goal stated:

> St. Joseph's School will continue to cooperate with the parish in its efforts to exercise responsible stewardship for the physical plant of the school by upgrading major systems and structures as necessary. The school will address safety issues as they occur and will plan for facility improvements that will enhance the educational programs of the school.

Selected Examples of Preliminary Strategies:

- Investigate a way to address the problem of bees getting into classrooms in the fall.
- Seek out ways to be more environmentally responsible; for example, by initiating a broader recycling program.
- Plan to make facility improvements to enhance the physical education program, e.g., replace shades on the gym's west windows, install an electronic scoreboard in the gym, and restore the locker and shower room to its original use.
- Improve the outdoor play area for primary-age children.

Sufficient time should be planned between this meeting and the next strategic long-range planning committee meeting for the subcommit-

tees to meet in order to write a preliminary draft of long-range goals, rationale for the goals, and suggested strategies for implementation of the goals. If possible, the work of each subcommittee should be circulated to the planning committee before the next meeting.

PHASE 3

Developing the Strategic Plan

The process of writing the strategic plan begins with the work of the subcommittees. Basing their work on careful listening to reports and discussions in the first nine hours of meetings, subcommittee members attempt to reflect the spirit of the planning committee in developing the goals and rationale while also being attentive to the issues that emerged as critical in suggesting implementation strategies. While developing a sense of ownership for their own work, subcommittee members must leave room for their work to be blended with the work of other subcommittees.

Meeting 4 or Morning Session

The strategic long-range planning committee typically needs either one full day or two three-hour sessions to complete the work of Phase 3. In the morning, or at the fourth planning committee meeting, each subcommittee presents its work in writing and reviews its deliberations with the full committee. Other committee members listen carefully to each report, assessing how information presented will impact the recommendations of their subcommittees.

Committee members need to remember that subcommittees were not asked to develop full implementation plans, since that responsibility rests initially with school administration in conjunction with appropriate groups. However, questions will undoubtedly arise regarding financial

implications of certain suggestions for implementation. At this stage in the process, it is wise not to allow the financial implications to stifle the potential visions for the preferred future of the school.

Hearing Subcommittee Reports. The strategic long-range planning committee chairperson calls the meeting together, leads the committee in prayer, and acknowledges the subcommittee work that has been done since the last meeting. Knowing the number of subcommittees, the chairperson divides the time equally among the subcommittees for the purpose of presentation, questions, and discussion. Before any decisions are made about adding to, subtracting from, or changing a subcommittee's work, the reports of all subcommittees should be heard and discussed.

Discussing Subcommittee Reports. When the subcommittee reports are completed, the chairperson asks for discussion on the goals articulated by each subcommittee. Then the chairperson calls for a straw vote on each goal. A straw vote is an indication of approval or disapproval of the essential content of the goal, not an affirmation of the exact wording of the goal.

Giving Feedback on Strategies. The last item on the agenda for this meeting is to give each subcommittee additional feedback regarding any considerations for possible revision of its suggested strategies for implementation. This can be done efficiently by having one person from each subcommittee ask: What strategies in our subcommittee's preliminary report would you modify or omit? Would you add anything?

Explaining Subcommittee Assignments. Based on the results of this meeting's discussions and straw vote, the subcommittee may need to revise its report before the next meeting. If this meeting includes a morning and afternoon session, subcommittee members should plan for a working lunch.

A second task of each subcommittee before the next meeting is to review its suggestions for implementation and to sort them in the following ways: (a) need additional monetary resources to implement the strategy or (b) do not need additional monetary resources to implement the strategy. Within each category, the subcommittee members should list the strategies in priority order according to when they would prefer to see implementation begin. If possible, a written copy of each subcommittee's work is given to committee members prior to the next session.

Wrap-up. To wrap up, the chairperson asks committee members to reflect on what they heard at this meeting that they feel will be most life-giving for the school community. The chairperson invites members to share their reflections.

Meeting 5 or Afternoon Session

The primary work of this session is to come to agreement on the content of the strategic long-range plan. The meeting consists mainly of discussion of each of the subcommittee's review and revision of its work based on the feedback it received at the last session. The full committee also needs to review each subcommittee's prioritization of implementation suggestions.

Hearing and Discussing Committee Reports. The committee chairperson again divides the time among the groups for reporting and discussion of their work. After the category groups conclude their discussion, the subcommittee that reviewed the mission and philosophy gives its report. The committee asks itself if the mission and philosophy need further discussion and possible revision in light of the long-range goals. If there is need for revision, this subcommittee will do this work before the next meeting.

Affirming the Work of the Subcommittees. When all subcommittees have completed their reports, the chairperson asks for affirmation of each subcommittee's work. This may be done by a straw vote on each section of the plan or by asking each person around the table for a yes or no response on the entire plan as presented to date.

Deciding on Strategic Priorities. Another area the committee must address is determining which issues deserve most immediate attention in designing detailed implementation strategies. Again, using colored dots to get a visual picture of the group's preference is an effective way to accomplish this task. Ask each subcommittee to write its top two priorities for strategic implementation on a sheet of chart paper. Give each person three colored dots representing first, second, and third choices. Within a few minutes the committee will see whether there is consensus on where the energies and attention of the school administration and other appropriate persons or bodies should be focused in the near future.

Reviewing the Format of the Plan. The final agenda items of this meeting are to review the format for the completed plan and to commission a writing team to draft the plan. The complete plan includes the following sections:

- Description of the planning process
- Names and positions of planning committee members
- The school's mission and philosophy statements
- The goals, rationale, and suggestions for implementation in each category
- A narrative that reflects the priorities that will be addressed first by the administration and other appropriate bodies or persons
- The next steps in the process

The chairperson asks one person from each subcommittee to be on the final writing team. Sufficient time is scheduled for the writing team to complete its work and to circulate it among the members before the final meeting of the full strategic long-range planning committee.

Wrap-up. The wrap-up question for this session is, What word or phrase describes your feeling about the plan or the process as we leave this meeting? The chairperson suggests that participants go around the table giving their word or phrase and reminds the group that a person is free to say "Pass."

PHASE 4

Drafting and Refining the Plan

With the work of the writing team, Phase 4 begins. The writing team takes all the pieces of work done by the subcommittees and puts them together into a full document. At a final meeting the strategic long-range planning committee approves the plan and decides how to present it to the board for approval.

Meeting 6 or Final Meeting

This is the final meeting of the strategic long-range planning committee. Prior to this meeting the principal and the chairperson of the committee arrange for a reception for the committee at the conclusion of the meeting. Asking volunteers from the parent association to host the reception and to prepare hors d'oeuvres and beverages is a good way to include this group in the celebration of the conclusion of this important phase of the planning process.

Presenting and Discussing the Strategic Long-range Plan. The draft of the plan crafted by the writing team should be in each member's hands before this meeting. Since there will be an ending ritual and a reception at the conclusion of the meeting, the meeting begins with a review of the agenda. Next, the writing team presents the plan to the committee for its review and discussion. Minor changes may be suggested to the writing team. At the conclusion of the discussion, the chairperson asks for formal acceptance of the plan by the strategic long-range planning committee.

Testing the Plan with Stakeholders. The next topic for discussion is how to review and test the plan with various stakeholders. For example, if, in the judgment of the committee, a parish group should review the plan, or if the parent association or faculty should read the completed plan before it is presented to the board for approval, the principal makes arrangements for these contacts. It is assumed that each of these groups received regular reports and communications and were asked for their ideas throughout the planning process, so nothing in the plan will be a surprise to them.

Planning the Presentation to the School Board. The committee next reviews the best means to present the plan to the school board for approval. In arranging for the presentation, the committee wants to be sure each school board member receives a copy of the plan prior to the meeting. In addition, the method of presentation to the board should engage members' interest and should draw on their participation. The board is approving the goals of the plan and is affirming the strategic directions set by the suggestions for implementation. It needs to understand that as specific implementation strategies are developed, it will receive information and give approval where appropriate.

Discussing Next Steps. Finally, the chairperson and the principal should review with the committee how their work will be carried forward and what will happen in Phase 5 of the planning process. After this, the pastor, the principal, and the committee chairperson thank committee members for their time and expertise. Their contributions will ensure the future of the Catholic school in their local community.

After the ending ritual (see Appendix J), the committee members enjoy a well-deserved celebration.

PHASE 5

Designing and Carrying Out Implementation Strategies

Phase 5 of the planning process is the responsibility of the school principal in consultation with appropriate groups, such as subcommittees of the school board, faculty groups, or parent groups. The approval of the school board may be needed in some cases, especially where plans include operational priorities, initiating new programs, and budgeting new dollars.

The implementation plan includes the action to be taken, the name of the person responsible, the beginning date, reporting date(s), the projected completion date, and the required resources. A sample of the form for the implementation plan is in Appendix K. It is critical to remember that the plan articulates goals for the next five years. Therefore, in designing the implementation plan, certain strategies will be realized in the near future and others will not begin until later.

The implementation plan provides the basis for the board to project what additional funding might need to be planned for in budgets for subsequent years. In the area of development, when developing a case statement or when speaking to donors, specific areas from the implementation plan might be included. The implementation plan also guides the development of yearly operational goals for the principal and the board.

It is the board's responsibility to monitor the progress of the implementation of the strategic long-range plan. The board does this by hearing reports from the principal at regular intervals, at least quarterly.

The principal updates the board on the progress of the implementation program and discusses implementation problems with the board. Collaboratively, the principal and the board make minor adjustments necessary in the implementation program itself or in the timeline.

PHASE 6

Updating the Plan on an Annual Basis

Prior to the time the board begins drafting the annual budget, it includes in a meeting agenda a review of the strategic long-range plan. In preparation for the meeting, the principal, along with any appropriate persons or groups, including the board, reviews the external factors and internal issues that surfaced at the third committee meeting and the items the committee named as critical issues. They review the strategic priorities, that is, the areas of the implementation plan the committee determined are first priority for implementation. They then revise the plan and the implementation program, based on any new information they have received. This review and suggested revisions in the plan or implementation program become the topics for the board's annual updating of the plan.

Most schools find it helpful to do a large-scale updating of their plan approximately once every five years or at an interval which complements other school processes, such as accreditation.

The process for renewing the plan is similar to the original process of creating the plan. The planning committee would review the current plan and implementation program to assess what was accomplished and what remained to be done. It would articulate external factors and internal issues and determine critical issues. The committee would then update the goals or create new ones, state its rationale, and suggest implementation strategies to achieve the goals. After a review of the mission and philosophy of the school, the committee would be ready to forward the

plan to the school board for approval and to the principal for updating, designing, and carrying out implementation procedures.

A strategic long-range plan is a guide for moving into the future. It makes public the ideas of the community as represented by the planning committee and the board. The plan gives the principal a map of the major directions toward which to guide the school. The implementation program provides a compass to guide the journey. In the end, however, it is not the paper that brings success to a school. It is the vision and the common sense of effective leadership, in collaboration with the voice and support of the community, that will ensure the future of a Catholic school.

APPENDIX A

Steps in the Planning Process

Phase 1: Initiating the Planning Process

The pastor, principal, and school board—

- Discuss what they understand by the term *strategic long-range planning*, why they want to do it, and how they think planning will enhance the life and future of their school
- Decide if the timing is right to initiate the planning process (Consider proximity to other major efforts, e.g., accreditation process, launching a development program.)
- Consider their concerns about doing strategic long-range planning (How might they overcome the concerns?)
- Make a commitment to do the planning
- Decide what long-range means in their planning process—three years? five years? longer?
- Outline or review an approach to planning and determine if it is realistic for their school, make initial modifications in the planning design
- Determine if a consultant is needed or desirable
- Construct a timetable and calendar of meetings
- Determine where meetings will be held
- Consider what expenses might be involved in doing the strategic long range-planning and plan for these expenses in the budget
- Decide on the size of the planning committee and determine what constituencies should be represented, suggest names of potential participants
- Discuss the role of the pastor, the principal, and the chairperson of the board
- Appoint the chairperson or cochairpersons of the strategic planning committee
- Determine what background material (e.g., mission and philosophy of the school, financial data, enrollment data, curriculum information, trends in education) is needed prior to the study and decide who will prepare it

- Decide if additional information is needed and how to obtain it (e.g., questionnaires, focus groups)
- Plan for communications about the planning process (To whom? At what points?)

Phase 2: Considering Contextual and Internal Elements

The strategic long-range planning committee—

- Reviews the history of the school, its current situation, and its role in the community
- Reviews the mission of the school and its philosophy (Are they clear? Should they change?)
- Brainstorms external factors that may impinge upon or enhance the school (What opportunities and threats will the school face in the next three to five years?)
- Brainstorms internal issues the school may face (What are the school's strengths and weaknesses?)
- Determines critical issues the school may face, based on external factors and internal issues

Phase 3: Developing the Strategic Plan

The strategic long-range planning committee—

- Articulates and comes to consensus on goals for the future of the school, taking into account the critical issues facing the school
- Develops and prioritizes within each category suggestions of strategies for implementation of the goals
- Establishes strategic priorities, that is, goals that warrant first priority in developing an implementation plan and that direct the energies of the principal
- Determines the format for the strategic long-range plan
- Commissions a writing team to draft preliminary goals and suggestions for implementation

Phase 4: Drafting and Refining the Plan

The strategic long-range planning committee—

- Reviews the mission and educational philosophy in light of the proposed plan

- Decides how to review the plan and to test the feasibility and desirability of the preferred scenario and goals with various stakeholders
- Edits and refines the draft of the plan
- Presents the strategic long-range plan to the board for its approval
- Celebrates and ritualizes the conclusion of these phases of the work

Phase 5: Designing and Carrying Out the Implementation Strategies

The principal, in consultation with those involved in the implementation process, and, where appropriate, with board approval—

- Plans the implementation program, including actions to be taken; who is responsible; beginning, completion, and reporting dates; and required resources
- Incorporates into the annual budget funds to implement the plan
- Includes implementation of the program in the principal's and board's yearly goals
- Monitors the progress of the plan through reports to the board at regular intervals
- Adjusts the implementation program as necessary

Phase 6: Updating the Plan on an Annual Basis

The principal, with appropriate groups, including the school board—

- Reviews external factors (opportunities and threats), internal issues (strengths and weaknesses), and critical issues
- Reviews strategic priorities
- Revises the plan and implementation program, based on new information
- Includes revisions in the coming year's operational planning

APPENDIX B

Sample Timetable and Calendar for Strategic Long-range Planning Meetings

Spring

Two meetings are held at which the school board members initiate the planning process

Late Spring and Summer

The principal—

- Contacts potential strategic long-range planning committee members
- Assembles background materials for the planning committee
- Develops communication materials for parents, faculty, parishioners, and other groups
- Engages consultant if necessary
- Makes arrangements for location of the committee meetings

September 15

The principal mails packets of materials to committee members

October 1 and 2

First evening and all-day meeting of the strategic long-range planning committee

or

October 1, October 8, and October 15

Three three-hour meetings of the strategic planning committee

By October 30

Subcommittees meet to synthesize work of committee to date and send copies of their preliminary reports to all committee members

Additional information needed by the committee is gathered and sent to all committee members

November 15

Second all-day meeting of strategic long-range planning committee

or

November 15 and November 22

Two three-hour meetings of the strategic long-range planning committee

December and January

Writing subcommittee prepares draft of the strategic long-range plan and sends the draft to committee members

February 1

Final meeting of the strategic long-range planning committee

February

Writing subcommittee prepares and edits the draft of the strategic long-range plan

March

Chairperson(s) of the planning committee presents the plan to the school board for approval

After Board Approval

Principal develops the implementation plan with appropriate consultation and approval

School board addresses process of ongoing monitoring and updating of plan

APPENDIX C

Worksheet 1
Benefits of Strategic Long-range Planning

Directions: Please list below the benefits of developing a strategic long-range plan. The ideas developed by the school board will be helpful in communicating the importance of this process to the strategic long-range planning committee, parents, parishioners, and others.

1.

2.

3.

4.

5.

6.

7.

APPENDIX D

Worksheet 2

Concerns Regarding Strategic Long-range Planning

Directions: Please list below the concerns that you have regarding the planning process. Then suggest ways to overcome the concerns.

CONCERNS REGARDING THE PLANNING PROCESS

1.

2.

3.

4.

5.

6.

WAYS TO ADDRESS OR OVERCOME THE CONCERNS

1.

2.

3.

4.

5.

6.

APPENDIX E

Worksheet 3
Potential Members of the Strategic Long-range Planning Committee

Directions: Please suggest members to serve on the strategic long-range planning committee by completing the form below.

	NAME	BACKGROUND AND SKILLS	INVITE YES/NO	ACCEPT YES/NO
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

APPENDIX F

Background Materials
Enrollment Statistics

Grade	Year					
	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96
Infant						
Pre-K 3						
Pre-K 4						
K						
1						
2						
3						
4						
5						
6						
7						
8						
Total						

Background Materials
Enrollment Projections

The following eight pages describe a way to project enrollment for the next five years. This is a three-step process. Following each set of directions and the chart(s) you will fill in are sample charts and statistics for your reference use. These statistics indicate what enrollment trends may be if current trends continue without any internal or external intervening factors.

Directions: Using the enrollment statistics on the preceding page, transfer the numbers from the four most recent years to the chart below.

FOUR MOST RECENT YEARS FROM ENROLLMENT STATISTICS

	Grade											
Year	**Infant**	**3yr**	**4yr**	**K**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**Total**
Year 1 1991-92													
Year 2 1992-93													
Year 3 1993-94													
Year 4 1994-95													

SAMPLE
FOUR MOST RECENT YEARS FROM ENROLLMENT STATISTICS

	Grade												
Year	**Infant**	**3yr**	**4yr**	**K**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**Total**
Year 1													
1991-92				42	40	34	39	34	28	44	42	40	343
Year 2													
1992-93				37	43	36	31	37	35	31	42	44	336
Year 3													
1993-94				37	39	37	34	28	36	36	26	37	310
Year 4													
1994-95				35	38	46	38	35	31	41	32	25	321

Background Materials
Enrollment Projections

Directions:

- Obtain retention ratios and averages for each grade by dividing, for example, the number of students in grade 1 in Year 2 (1992-93) by the number of students in K in Year 1 (1991-92).
- Next, divide the number of students in grade 1 in Year 3 (1993-94) by the number of students in K in Year 2 (1992-93).
- Then, divide the number of students in grade 1 in Year 4 (1994-95) by the number of students in K in Year 3 (1993-94).
- Finally, add the three numbers you obtained and find the average by dividing the sum by 3. Put your answers in the first column of the chart below.
- Continue in the same manner, filling in each column.

RETENTION RATIOS AND AVERAGES

	Grade										
Year	**Infant-3yr**	**3yr-4yr**	**4yr-K**	**K-1**	**1-2**	**2-3**	**3-4**	**4-5**	**5-6**	**6-7**	**7-8**
Year 1-2											
Year 2-3											
Year 3-4											
Total											
Average											

SAMPLE RETENTION RATIOS AND AVERAGES

	Grade									
Year	Infant-3yr	3yr-4yr	4yr-K	K-1	1-2	2-3	3-4	4-5	5-6	6-7	7-8
Year 1-2		(43÷42=)		1.02	.90	.91	.95	1.03	1.11	.95	1.05
Year 2-3		(39÷37=)		1.05	.86	.94	.90	.97	1.03	.84	.88
Year 3-4		(38÷37=)		1.02	1.18	1.02	1.03	1.11	1.14	.89	.96
Total				3.09	2.94	2.87	2.88	3.11	3.28	2.68	2.89
Average				1.03	1.00	.97	.97	1.05	1.10	.89	.96

Background Materials
Enrollment Projections

Directions:

- To develop a five-year enrollment projection with a liberal estimate of the number of students, determine the highest number of students you might expect in your lowest grade.
- To obtain an estimate of the number of students in each grade for the next school year, multiply the actual number of students in that grade this year by the average retention ratio for that grade (see preceding page for these figures). Put the answer in the row and column representing the year and grade for the following year.
- Fill in the chart for the next five years by multiplying each number in a column by the retention ratio average for that grade.
- Next, develop a conservative projection of enrollment by determining the smallest number of students you might expect in your lowest grade.
- Repeat the calculation process. See sample calculations on page 54.

PROJECTION A:
LIBERAL ESTIMATE OF FIVE-YEAR ENROLLMENT

	Grade												
	Infant	**3yr**	**4yr**	**K**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**Total**
Average Retention Ratio													
Year													
1995-96													
1996-97													
1997-98													
1998-99													
1999-2000													

PROJECTION B:
CONSERVATIVE ESTIMATE OF FIVE-YEAR ENROLLMENT

	Grade											
	Infant	3yr	4yr	K	1	2	3	4	5	6	7	8	Total
Average Retention Ratio													
Year													
1995-96													
1996-97													
1997-98													
1998-99													
1999-2000													

Background Materials
Enrollment Projections

SAMPLE PROJECTION A:
LIBERAL ESTIMATE OF FIVE-YEAR ENROLLMENT

	Grade										
	Infant	3yr	4yr	K	1	2	3	4	5	6	7	8	Total
Average Retention Ratio				1.03	1.00	.97	.97	1.05	1.10	.89	.96		
Year													
1995-96				40	36	38	45	37	37	34	37	31	334
1996-97				40	41	36	37	43	39	49	30	35	343
1997-98				40	41	42	35	36	45	42	36	29	348
1998-99				40	41	42	40	34	38	50	38	35	358
1999-2000				40	41	42	40	39	36	41	44	36	361

SAMPLE PROJECTION B:
CONSERVATIVE ESTIMATE OF FIVE-YEAR ENROLLMENT

	Grade										
	Infant	3yr	4yr	K	1	2	3	4	5	6	7	8	Total
Average Retention Ratio				1.03	1.00	.97	.97	1.05	1.10	.89	.96		
Year													
1995-96				35	36	38	45	37	37	34	37	31	329
1996-97				35	36	36	37	43	39	40	30	35	333
1997-98				35	36	36	35	36	45	42	36	29	332
1998-99				35	36	36	35	34	38	50	38	35	337
1999-2000				35	36	36	35	34	36	41	44	36	336

Background Materials
Enrollment Projections

PARISHIONERS AND NONPARISHIONERS

	Year				
	1990-91	1991-92	1992-93	1993-94	1994-95
Parishioners					
Nonparishioners					
Total					

PROJECTIONS
(Using the average ratio for the last five years)

	Year				
	1995-96	1996-97	1997-98	1998-99	1999-2000
Parishioners					
Nonparishioners					
Total					

Background Materials
Curriculum Changes

Below are the subjects taught in your school. List significant changes that occurred in that area under the year. These changes could include adoption of a new textbook series, staff development in the area, review of the school's resources to support the area, review of the school's philosophy and goals for teaching in the area, review of content taught in each grade.

	Year			
Curriculum Areas	**1990-91**	**1991-92**	**1992-93**	**1994-95**
Religious Studies				
Mathematics				
Reading/Literature				
Language Arts				
Social Studies				
Science				
Arts				
Others				

APPENDIX G

Suggested Agendas for the Strategic Long-range Planning Committee Meetings

Phase 2: Meeting 1 or Evening Session
Suggested Agenda

6:00 p.m.	Light Supper or Dessert
6:30	Convene Meeting • Introduction and welcome by committee chairperson, pastor, and principal • Introduction of committee members (major work commitments, association with school, why you said yes, skills and expertise)
7:00	Commissioning Ritual
7:15	Review of the Planning Process • School board chairperson - Phase 1 • Strategic long-range planning committee chairperson(s) - Phases 2 through 4 • School principal - Phases 5 and 6
7:45	Break
8:00	Group Discussions of Background Materials • What questions does this material raise? • What trends do we see in these materials? • What further information do we need to have in this area?
8:30	Group Reports to Full Committee
8:55	Wrap-up
9:00	Adjourn

Phase 2: Meeting 2 or Morning Session
Suggested Agenda

9:00 a.m. or 6:00 p.m.	Coffee and Rolls or Coffee, Cold Drinks, and Cookies
9:15 or 6:15	Convene Meeting • Prayer • Review agenda
9:20 or 6:20	Investigating Our History • Stories - presentation • Timeline - activity • What can we learn from our history? - discussion
10:00 or 7:00	Looking at the Current Situation • Perspectives - presentations • What issues and trends did we hear? - discussion
10:30 or 7:30	Break
10:45 or 7:45	Projecting Our Mission • Discuss in groups and record on chart paper (15 minutes): - What role do we want this school to play in the community five years from now? - How will the school serve the community? - Whom will it serve? - Why should the school not only exist but flourish? • Group reports to full committee and discussion of similarities and differences (25 minutes)
11:25 or 8:25	Reviewing Our Personal Beliefs (Philosophy/ Vision) • Personal selection of important beliefs • Group response to philosophy/vision
11:55 or 8:55	Wrap-up
12:00 or 9:00	Adjourn

Phase 2: Meeting 3 or Afternoon Session Suggested Agenda

1:00 or 6:00	Convene Meeting • Prayer (for evening session) • Review agenda • Review brainstorming rules
1:10 or 6:10	Brainstorm External Factors
1:25 or 6:25	Brainstorm Internal Factors
1:40 or 6:40	Assess External Factors for Impact on the School
2:10 or 7:10	Sort Internal Factors into Categories
2:30 or 7:30	Break
2:45 or 7:45	Conduct Around-the-Table Activity and Determine Critical Issues
3:15 or 8:15	Suggest Possible Strategies
3:55 or 8:55	Wrap-up
4:00 or 9:00	Adjourn Sign Up For Subcommittees and Set First Meeting Date

Phase 3: Meeting 4 or Morning Session Suggested Agenda

9:00 a.m. or 6:00 p.m.	Convene Meeting • Prayer • Review agenda
9:05 to 11:15 or 6:05 to 8:15	Subcommittee Reports (Include a 10-minute break at approximately 10:20 a.m. or 7:20 p.m.)
11:15 or 8:15	Discussion of Goals and Straw Vote
11:30 or 8:30	Feedback on Strategies for Implementation
11:50 or 8:50	Explanation of Subcommittee Assignments
11:55 or 8:55	Wrap-up
12:00 or 9:00	Adjourn

Meeting 5 or Afternoon Session
Suggested Agenda

1:00 p.m. or 6:00 p.m.	Convene Meeting • Prayer • Review agenda
1:05 to 3:15 or 6:05 to 8:15	Committee Reports and Discussion (Include a 10-minute break at approximately 2:20 or 7:20)
3:15 or 8:15	Affirmation of Subcommittees' Work
3:30 or 8:30	Decision on Strategic Priorities
3:45 or 8:45	Review of Format of Plan and Form-Writing Team
3:55 or 8:55	Wrap-up
4:00 or 9:00	Adjourn

Phase 4: Meeting 6 or Final Meeting
Suggested Agenda

6:00 p.m.	Convene Meeting • Review agenda
6:05	Presentation and Discussion of Strategic Long-range Plan
7:00	Formal Acceptance of the Plan by the Strategic Long-range Planning Committee
7:05	Discussion of How to Review the Plan with Various Stakeholders
7:20	Discussion of Presentation of Plan to the School Board
7:30	Discussion of Next Steps
7:45	Closing Remarks from Pastor, Principal, and Committee Chairperson
7:55	Ending Ritual
8:00	Celebration (with hors d'oeuvre party for the committee)

APPENDIX II

Commissioning Ritual

Lighting of Candle (Candle and environment should be appropriate for the liturgical season.)

Leader: Loving God, we are gathered to begin very necessary and serious work to ensure the future of our Catholic school. We call upon your Spirit to give us the wisdom, courage, and strength to dare to do what needs to be done.

All: Open our minds and hearts to hear the call of your Spirit. Help us to put aside any obstacles that would hinder the energy of this group gathered in your name.

Leader: Loving God who gathers us,

All: We name ourselves as your people. We ask your blessing on each of us as we begin this work together. Strengthened by our belief and commitment to our children, we stand ready to work hard to ensure a strong educational future for them. Generously bless us with the spirit of your Son, Jesus, as we are called to proclaim truth and work for justice.

Reading: Creator of all, you are infinite mystery to us. To give us access to you, you became one of us. You walked with our ancestors in faith, felt hunger and loneliness, community, and joy. You laughed and wept, lived anger and forgiveness, struggled to accept the way life was for you. Jesus, God-with-us, we welcome and embrace you today in ourselves and in each other. You spoke and acted for change where it was needed: You warned, reached out, and taught; you counseled, ministered, and healed. You made peace and you invited people to open their minds and hearts. You taught us how to pray, and you laid down your life for us. You promised that you would be with us always, and we gather in that promise.

Leader: Let us begin the work before us in the name of our Creator God, in Jesus Christ, our Brother and Redeemer, and blessed by the gifts of the Holy Spirit.

All: Amen!

APPENDIX I

Meeting Prayer

Lighting of Candle — (The candle should remain in the center of the table during each meeting. It may be extinguished at the end of the prayer.)

All:

Loving Creator, we call upon you
To gather us together
From all of our marginal places
So that we might together form
A new order of justice.
Fill us with the power of
Your Spirit, ignite us with
The full fire of your life,
Which we believe we can fully share
By joining together,
Shoulder to shoulder,
Hand in hand, heart in heart,
To continue to do your work.
Recognizing you are God of us all,
We ask for your wisdom, grace, and blessing
As Jesus taught us to do.

Leader: Let us begin the work before us in the name of our Creator God, in Jesus Christ, our Brother and Redeemer, and blessed by the gifts of the Holy Spirit.

All: Amen!

APPENDIX J

Ending Ritual

Lighting of Candle

Leader: Creator God, you gathered us to do very necessary and hard work to ensure the future of our Catholic school. We called upon you to teach us the path to follow, allowing us to lead our community to a new frontier. Your Spirit gave us the wisdom, courage, and strength to accomplish the task and for this we are most grateful.

All: We thank you, generous God, for opening our minds and hearts to hear the call of your Spirit. We have grown in our love and respect for each other and the diversity of talents and gifts you have given to each of us. May the work of our hands be blessed by you.

Reader 1: Creator God, who has given us the Law of Love, we thank you for this day. We praise you for the beauty and glory of your creation. You made each of us and saw that it was good. We join the wonderful variety of your creation as we sing your praise:

Response: "You shall love Yahweh your God with all your heart, soul, and strength, and love your neighbor as yourself. This is Yahweh's Law of Love."

Reader 2: Creator Spirit, we thank you for the great diversity of your creation. You made every person in your image and likeness: all our colors, all our abilities, all our languages, vocations, talents and dreams—all of us, coming from you, are pleasing to you.

Reader 3: You gave us your Law of Love: "Love one another as I have loved you." Through the stories of Scripture, through the renewing cycles of creation, through the life-giving experi-

ences we are given each day, and through the incarnation of your Son, Jesus, you have shown us again and again what love is.

Response: "You shall love Yahweh your God with all your heart, soul, and strength, and love your neighbor as yourself. This is Yahweh's Law of Love."

Reader 4: Today we declare that we live in Jesus, and he lives in us. We renew our commitment to fulfilling your Law of Love in ways he taught us: healing the sick, comforting the dying, assisting the poor, making peace, and teaching justice.

Reader 5: Wonderful Creator, we stand together with your Son, our Brother, in the presence of your power. Unite us in the peace and joy of this shared work; renew us to live your Law of Love in our wounded world. Inspire us and empower our leaders to carry on the work we have begun. May our efforts contribute to peace and justice in our world.

All: As we continue to help renew the world according to your Law of Love, we thankfully proclaim that it is through Christ, with Christ, and in Christ, in the unity of the Holy Spirit, all glory and honor is yours, all-loving God, forever and ever. Amen!

(Candle is extinguished and handed to the principal as a symbol of the mandate to continue the work begun by the strategic long-range planning committee. Each person gives a greeting of peace to all who gave so generously of their time and talents.)

APPENDIX K

Implementation Form

Goal:

Implementation:

Action	Person(s)	Start	Completion	Resources

(Other headings could include date to report to the school board and notes regarding progress.)

APPENDIX L

Postplanning Questionnaire

The strategic long-range planning process in this publication grew out of the research and experience of the authors. We would be grateful for your assessment and suggestions regarding the process, so we can use the wisdom of many individuals in possible revisions of the publication.

Please answer the following questions and return the questionnaire to:

Department of Elementary Schools
National Catholic Educational Association
1077 30th Street, N.W., Suite 100
Washington, DC 20007-3852

1. What did you find most helpful about the strategic long-range planning process suggested in this publication?

2. Did you find any portion of the suggested process confusing or unclear? If so, please explain.

3. Did you use any processes not recommended here that worked well with your committee? If so, please describe.

4. What suggestions would you have for revisions of the suggested process?

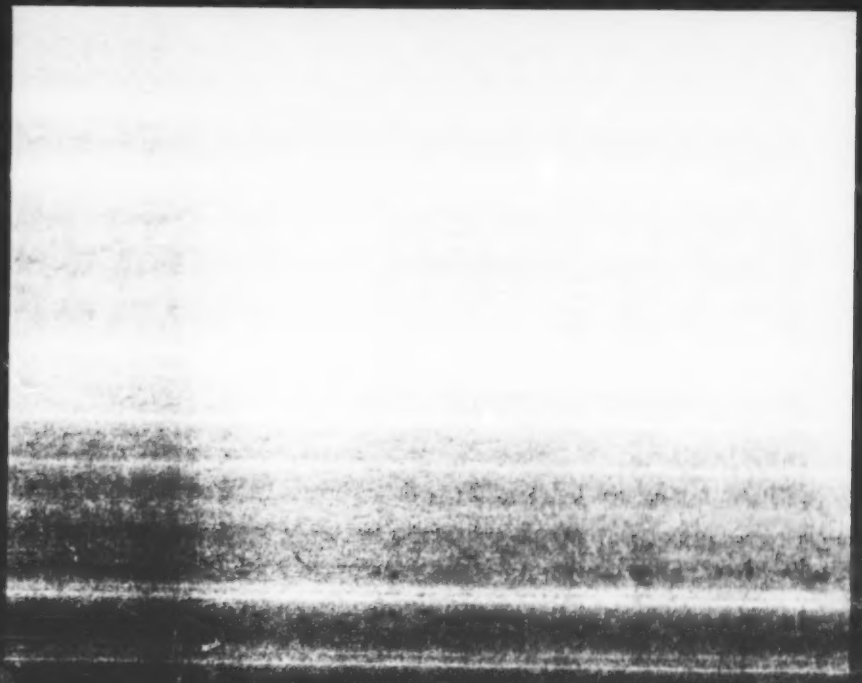
Name_____

School _____

Address_____

City, State, Zip _____

Phone (_____) _____



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